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Collateral Interview Outline

1. Interview Details (Administrative Information)

• Date and time of interview
• Mode of interview (in-person / telephonic / virtual)
• Location (if applicable)
• Name, role, and contact details of collateral informant
• Relationship of informant to the client
• Purpose of obtaining collateral information

2. Context and Relationship to the Client

• Duration and nature of the relationship
• Frequency and context of interactions with the client
• Relevant background about the informant-client relationship
• Potential conflicts of interest or relational dynamics

3. Information Gathered (Factual Summary)

Clarifying the Referral Problem

- Describe the specific concern or issue raised by the referral source.
- Ask the informant to define the problem in their own words.
- Identify who is involved and in what capacity.
- Determine when the problem was first noticed (timeline).
- Establish frequency and severity of the issue.
- Identify any immediate risks or safety concerns.
- Explore any previous attempts to address the problem.

Clarifying the Context of the Problem

- Describe the environment where the problem occurs (home, school, community).

- Identify people present during incidents or who influence the situation.
- Explore relational dynamics relevant to the issue (child-caregiver, sibling, teacher).
- Note any triggers, patterns, or environmental factors.
- Consider cultural, social, or systemic influences on the behaviour or situation.
- Document any previous interventions or supports in place.
- Assess any barriers that may affect resolution of the problem.

Clarifying the Effects / Impact of the Problem

- Document the effect on the child or client's emotional, social, academic, or behavioural functioning.
- Identify secondary effects on family, peers, or caregivers.
- Note changes in routines, participation, or relationships caused by the problem.
- Capture any positive or negative coping strategies observed.
- Identify short-term and long-term concerns from the informant's perspective.
- Document observations of distress, fear, or safety concerns linked to the problem.
- Highlight discrepancies between different informants' perceptions of impact.

4. Behavioural Examples

• Concrete, observable examples shared by the informant

• Frequency, duration, and context of behaviours

• Any timelines or patterns described

5. Themes and Patterns Identified

• Recurring concerns or behaviours

• Environmental or relational patterns described

• Noted triggers or contextual factors

6. Post Interview Considerations

Emotional Tone and Presentation (If Relevant)

• Informant's emotional state during interview

• Emotional intensity or sensitivity around certain topics
• Signs of distress, frustration, anxiety, or bias that may impact reporting

Reliability, Bias, and Limitations

• Whether information appears consistent or contradictory
• Any second-hand or unverified information
• How relationship dynamics may affect reporting
• Degree of confidence the informant expressed
• Notation of clear biases where applicable

Relevance to the Referral Question

• How the collateral information addresses the referral question
• Any gaps that remain
• Points requiring follow-up or verification

7. Summary and Next Steps

• Overall summary of key information gathered
• Immediate actions required (e.g., mandated reporting)
• Follow-up interviews or information needed
• How information will be integrated into the broader assessment